Ohio Historical Society
State Archives of Ohio
Local Government Records Program
*800 E. 17th Avenue*
*Columbus, Ohio 43211-2497*

OHIO HISTORICAL SOCIETY
DEC - 9 2013
STATE AND LOCAL GOVERNMENT RECORDS

**For State Archives - LGRP Use Only**

Date Reviewed:

*Form Scanned:* _____

# RECORDS RETENTION SCHEDULE (RC-2) – Part 1

*See instructions before completing this form. Must be submitted with PART 2*

**Section A: Local Government Unit** ***(To complete this form online, use "tab" key to jump from box to box.)***

General Schedule – All County Offices and Agencies
(Local government entity) (Unit)

Barb Brown — Barb Brown — Records Manager
(Signature of responsible official) (Name) (Title) (Date)

**Section B: Records Commission**

Clermont County Records Commission — (513)735-8660
Records Commission (Telephone number)

289 East Main Street — Batavia — 45103 — Clermont
(Address) (City) (Zip code) (County)

To have this form returned to the Records Commission electronically, include an email address:

_____

I hereby certify that our records commission met in an open meeting, as required by Section 121.22 ORC, and approved the schedules listed on this form and any continuation sheets. I further certify that our commission will make every effort to prevent these records series from being destroyed, transferred, or otherwise disposed of in violation of these schedules and that no record will be knowingly disposed of which pertains to any pending legal case, claim, action or request. This action is reflected in the minutes kept by this commission.

Edwin H Humphrey — 12/3/13
Records Commission Chair Signature Date

**Section C: Ohio Historical Society - State Archives**

[illegible] — Electronic Records Assistant — 12/12/2013
Signature Title Date

**Section D: Auditor of State**

Martin E. Mack — 12-31-13
Signature Date

***Please Note: The State Archives retains RC-2 forms permanently.***
***It is strongly recommended that the Records Commission retain a permanent copy of this form***

# Schedule of Records Retention and Disposition
## Continuation Sheet

**Section E: Records Retention Schedule**

## General Schedule – All County Offices and Agencies

(Local government entity)

| (1) Schedule Number | (2) Record Title and Description | (3) Retention Period | (4) Media Type | (5) For use by Auditor of State or OHS-LGRP | (6) RC-3 Required by OHS-LGRP |
|---|---|---|---|---|---|
| G1017-01 | AUDIT TRAIL FILES - Data generated during the creation of a database during the processing cycle. | 28 days (daily backup retention cycle), or transfer to disk. | Electronic | | ☐ |
| G1017-02 | BLANK FORMS - Obsolete, unessential or superseded forms stock. | Destroy immediately | Paper/Electronic | | ☐ |
| G1017-03 | COPIES - EXTRA COPIES - PHOTOCOPIES - Internally duplicated copies of official records, used for reference or reading. | Destroy immediately | Paper/Electronic | | ☐ |
| G1017-04 | BULLETINS, POSTERS AND NOTICES - Information used for the sole purpose of informing people of events or other activities, including unsolicited announcements, invitations, etc., not filed as evidence of office operations. | Destroy immediately | Paper/Electronic | | ☐ |
| G1017-05 | CORRESPONDENCE -EXECUTIVE - Administration of their Office - Information concerning agency policies, fiscal and personnel matters. | 2 years | Paper/Electronic | | ☐ |
| G1017-06 | CORRESPONDENCE -GENERAL Internal correspondence from various individuals, companies, or organizations requesting information pertaining to local and legal interpretation and other misc. (informative and does not attempt to influence policy or procedures). | 1 year | Paper/Electronic | | ☐ |
| G1017-07 | CORRESPONDENCE - PERSONAL - Any paper or electronic document received and not defined as business related. | Destroy immediately | Paper/Electronic | | ☐ |
| G1017-08 | CORRESPONDENCE - ROUTINE Referral letters, request for routine information, answered by standard form letter. | 6 months | Paper/Electronic | | ☐ |
| G1017-09 | DEPARTMENTAL POLICIES & PROCEDURES - Adopted and/or implemented, substantial reports & policy studies. | Paper<br>Electronic | Permanent<br>Move to another media type | | ☐ |

# Schedule of Records Retention and Disposition
# Continuation Sheet

## General Schedule – All County Offices and Agencies

(Local government entity)

| (1) Schedule Number | (2) Record Title and Description | (3) Retention Period | (4) Media Type | (5) For use by Auditor of State or OHS-LGRP | (6) RC-3 Required by OHS-LGRP |
|---|---|---|---|---|---|
| G1017-10 | ELECTRONIC FORMS AND MEDIA - Office copies of computer forms, disks, tapes, cards, etc., used as preliminary input or temporary storage or output control, the results of which are produced or are otherwise available in record form, microfilm, microfiche, or online. | Destroy immediately | All Varieties | | ☐ |
| G1017-11 | MINUTES OF AGENCY STAFF MEETINGS: Minutes and supporting documenting internal policy decisions. | 2 years | Paper/Electronic | | ☐ |
| G1017-12 | MONTHLY and WEEKLY REPORTS: Documents status of on-going projects and issues; advise supervisors of various events and issues. | 1 year | Paper/Electronic | | ☐ |
| G1017-13 | SYSTEM BACKUP FILES - To restore system in case of disaster or destruction. | Daily backup - 28 days<br>Month end - 1 year<br>Year end backup - 5 years | Tapes | | ☐ |
| G1017-14 | TAPE RECORDINGS AND/OR SHORTHAND NOTES - Verbatim recordings of meetings later summarized in other written official proceedings or minutes. | Destroy after the approval of the official records. | Tapes | | ☐ |
| G1017-15 | TRANSIENT DOCUMENTS - Telephone messages, drafts, (publications, reports, memos, meeting notices) and other documents which serve to convey information of temporary importance in lieu of oral communication. | Destroy immediately | Paper/Electronic | | ☐ |
| G1017-16 | RECOVERY MEDIA-Records relating to the protection and reestablishment of computer operating systems, data processing services, equipment and data (back up files) in case of a disaster. One copy to be stored off-site. | Until updated, superseded, or obsolete | All Media | | ☐ |

# Schedule of Records Retention and Disposition
# Continuation Sheet

## General Schedule – All County Offices and Agencies

(Local government entity)

| (1) Schedule Number | (2) Record Title and Description | (3) Retention Period | (4) Media Type | (5) For use by Auditor of State or OHS-LGRP | (6) RC-3 Required by OHS-LGRP |
|---|---|---|---|---|---|
| G1017-17 | ELECTRONIC MAIL - EMAIL | Non-Record – Delete immediately<br>Permanent Record – Retain in paper or electronic format other than e-mail<br>All Other Records – E-mail archives | Electronic | | ☐ |
| G1017-18 | EXPENSE RECORDS – Copies of Purchase Orders, Requisitions, Invoices, Billing Records, Receipt Documents and Travel Expense Records. | 2 years after Fiscal year, provided audited.<br>Original maintained at Auditor's Office | Paper/Electronic | | ☐ |
| G1017-19 | PAYROLL WORKSHEETS – Time Input Worksheets, Time Cards, Payroll Timesheets, Departmental Timesheets, Leave Requests, Individual Payroll Deduction Reports, OBES Reports. | 2 years | Paper/Electronic | | ☐ |
| G1017-20 | ELECTRONIC MAIL INFORMATION SYSTEMS/E-MAIL ARCHIVES | 3 years<br>Exchange Dumpster – Once the user manually deletes their e-mails from the Deleted Items Folder, the system will purge them on a revolving 14-30 day increment basis as deemed appropriate by the Information Systems Department | Electronic | | ☐ |
| G1017-21 | PROCUREMENT CARD RECORDS – Receipts, Purchasing Logs, Individual Billing Statements and Department Billing Statements | 5 years | Paper/Electronic | | ☐ |

Audited means: the years contemplated by the records have been audited by the Auditor of State and the audit report has been issued pursuant to Sec. 117.10 O.R.C.

# Schedule of Records Retention and Disposition
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(Local government entity)

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|---|---|---|---|---|---|
| G1017-22 | SOCIAL NETWORKING RECORDS - Including Blogs, Wikis, Twitter, Facebook, YouTube and Other Related Applications:<br><br>Duplicate Records – Public Records Linked or Posted to County Site and retained elsewhere<br>Transitory Records – General Postings, Comments, Feedback and Related Records | Duplicate Records - Retain per departmental retention schedule<br><br>Transitory Records – Delete 7 days from date of County's original posting | Paper/Electronic | | ☐ |
| G1017-23 | COUNTY AUCTION RECORDS – All records related to the County Auction Process | 1 year | Paper/Electronic | | ☐ |
| G1017-24 | ANNUAL INVENTORY – Departmental Inventory of all materials, machinery, tools and other supplies under each county office or department per O.R.C. 305.18 | 2 years | Paper/Electronic | | ☐ |
| G1017-25 | HEALTH INSURANCE FORMS – Current and former employee's historical insurance forms | 2 years | Paper/Electronic | | ☐ |
| G1017-26 | PUBLIC RECORDS REQUESTS – ORC 149.43 - Requests to inspect and review public records to include logs | 2 years | Paper/Electronic | | ☐ |
| G1017-27 | VOICE MAIL RECORDS – Messages for recipients received via telephone which can also be stored and accessed in the Countywide Email System | Until no longer of administrative value | Paper/Electronic | | ☐ |

***Media Type - Electronic Record is any combination of text, graphics, data, audio, pictorial, or other information representative in digital form that is created, modified, maintained, archived, retrieved, or distributed by a computer system.**

***Electronic Mail (e-mail) is a *format* on which records are sent, received and/or drafted using electronic mailing systems. E-mail is NOT a record series. Instead each *individual* e-mail should be evaluated according to its content and retained in accordance with the record series that the content most closely fits.**

**THIS GENERAL SCHEDULE DOES NOT MODIFY OR SUPERSEDE ANY SPECIFIC OFFICE, AGENCY, OR DEPARTMENTAL SCHEDULE ALREADY APPROVED BY THE COUNTY RECORDS COMMISSION.**

**WHEN USING THIS GENERAL SCHEDULE, A CERTIFICATE OF RECORDS DISPOSAL (RC-3) IS NOT REQUIRED BY THE RECORDS COMMISSION.**